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FEI SYSTEMS

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Introduction




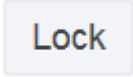





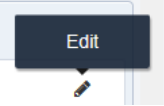
This user guide has been prepared for all instances of WITS. It serves as an introduction to acclimate the user to the new Enhanced WITS Architecture – Staff Model Changes. This guide will focus on the Staff Module and take the user through a step by step process of how to view and enter data in this module. In addition, this guide will highlight key differences in WITS Prime vs. WITS EA Staff Module.


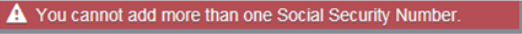


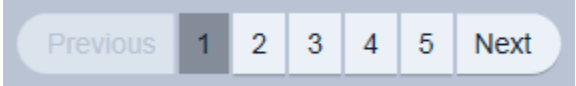
Please review the WITS EA Basics section of this document as it highlights new icons and topics features you will come across as you begin using the new Staff Module.

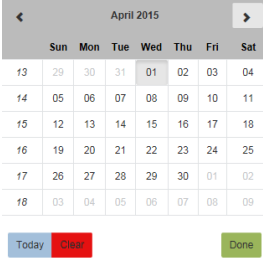


WITS EA

Basics

The Basics section acquaints the user with new icons and features used throughout the staff module.

 Add	Add: Allows the user to add data to the panel or section.		Edit: Allows the user to edit information on a panel or section.
	Remove: Allows the user to delete information in the panel or section.		Lock: Allows the user to lock an item.
	History: Allows the user to view the changes made on the current page.		Panel View: Presents data in a panel by panel view.
	Table View: Presents data in a table format.		Export: Allows the user to export results.
	Column Selector: Allows the user to select the columns that they would like to view.		Hover Text: When you hover over an item or symbol text describing the item may appear.

 From: ●●● To: 123	Eye Icon: Allows the user to see protected information hidden by dots. By hovering over the icon they can now see the actual information contained within the field.
	Error Message: The error message is localized and is generated where the error occurred.
	Required Field: Has a red bar to the right of the field. User must enter data to save.
	Discretionary Field: Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.
	Pages: Allows the user to page through all search results.

	<p>Date Picker: Allows the user to pick a date from a calendar.</p>
	<p>Likert Scale: Presents information visually and allows for quick interpretation of the data.</p>
	<p>Collapsible Menu: The left hand navigation menu is collapsible in WITS on the Staff Member and System Account screens. When it is collapsed you will only see the icon to the left. When it is un-collapsed you will see the entire left hand navigation panel.</p>

New Screen Features

The screen mockups for the Staff Member Search and Staff Member Profile screens serve to acquaint users with the new layout and to point out new features in the WITS that a user can leverage when using the system.

Staff Member Search Screen

The mockup displays the Staff Member Search interface. At the top, the header shows 'HI-WITS QA' and user information. The search bar includes a 'Search' button and 'Enhanced search options'. A 'Collapsible Menu' is on the left. The main table lists staff members with columns for First Name, Last Name, Agency, and Email. A 'Page through results' section shows pagination controls. A 'Select Columns' dropdown menu is open, showing options to select or unselect columns. A 'Change your screen view' button is also visible. Below the table, a detailed profile view for a staff member is shown, including their name, agency, and contact information.

Collapsible Menu

Screen View #1
Grid, Table View

Screen View #2
Panel View

Page through results

Select Columns

- ☒ First Name
- ☒ Last Name
- ☒ Agency
- ☒ Email
- ☒ Check all

Change your screen view

Select only column headers you wish to view

First Name	Last Name	Agency	Email
Zler	Mahony	Administrative Agency	ikeitz@feinfo.com
Bill	Magro	Administrative Agency	Bill.Magro@feisystems.com
Mama	Lucia	Administrative Agency	mrbugle33@hotmail.com
Lock	7411	Administrative Agency	skumar@feinfo.com
Reset Credentials	7911	Administrative Agency	skumar@feinfo.com
View Profile	16737	Administrative Agency	mark.woods@feisystems.com
Test	Access	Administrative Agency	rkinney@feinfo.com
StarManagement	Loey	Administrative Agency	lara.loey@feisystems.com
Mara	Howard	Administrative Agency	mhoward@dhmh.state.md.us
Mari	Cholinski	Administrative Agency	mcholinski@feinfo.com
Mart	Haas	Administrative Agency	msarhy@feinfo.com
Marion	Samuel	Administrative Agency	ZeeShawn.KRanaatochora@feisystems.com
Lieberman	Brar	Administrative Agency	abrar@feinfo.com
Amirvir	Moyseyev	Administrative Agency	maksym.moyseyev@feisystems.com
Maksym	Katnhura	Administrative Agency	Mahan.Katnhura@feisystems.com

Showing 1-50 of 223

Previous 1 2 3 4 5 Next

1 1

Administrative Agency
sean.lafrance@feisystems.com

Lock View Profile

testuser 13233

Administrative Agency
skumar@feinfo.com

Lock View Profile

Test 16737

Administrative Agency
mark.woods@feisystems.com

Lock View Profile

test 5585

Administrative Agency
dgarg@feinfo.com

Lock View Profile

Staff Member Search Screen Features

1. **Collapsible menu**- allows more horizontal on screen real estate
2. **Searches:**
 - a. *Simple Search*- searches through the columns that are currently displayed on screen for the values that were entered. It is a “contains” type of search.
 - i. Customize this by adding selected columns to show on screen
 - ii. New UI searches as you type
 - iii. Matching search results highlighted.
 - b. *Advanced search*- enables you to choose search criteria and save those searches to your computer via a cookie.
 - i. Allows the user to search columns that they choose.
 - ii. Save your advanced searches
 - iii. Matching search results highlighted.
3. **Page through search results**- search results are not limited but will be shown a page at a time.
4. **View of data**
 - a. *Table View*-Shows the data as a list of rows and columns.
 - b. *Panel view* –Shows the data as a list of panels.
5. **Staff Member List**
 - a. *Column Headers*
 - i. Sorts staff members by the selected columns when clicked.
 - ii. The user can customize which columns are displayed.
 - b. These preferences are saved to your computer only.

Staff Member Profile Screen

The screenshot displays the HI-WITS QA Staff Member Profile Screen. At the top, the header shows the user 'Ferrante, Maria' and the location 'Administrative Agency'. The main content area is divided into several sections: 'Profile' (showing a photo placeholder and personal details for Lucia, Mama), 'Employment Profile' (showing job title, staff member type, employment type, and date range), 'User Account' (showing User ID: mlucia and roles), and 'Facility Assignments' (showing the Administrative Unit). A 'Completion Requirements' sidebar on the right lists items to complete the profile, such as 'Add Social Security Number'. A 'DONE EDITING' button is visible at the top right.

Staff Member Profile Screen Features

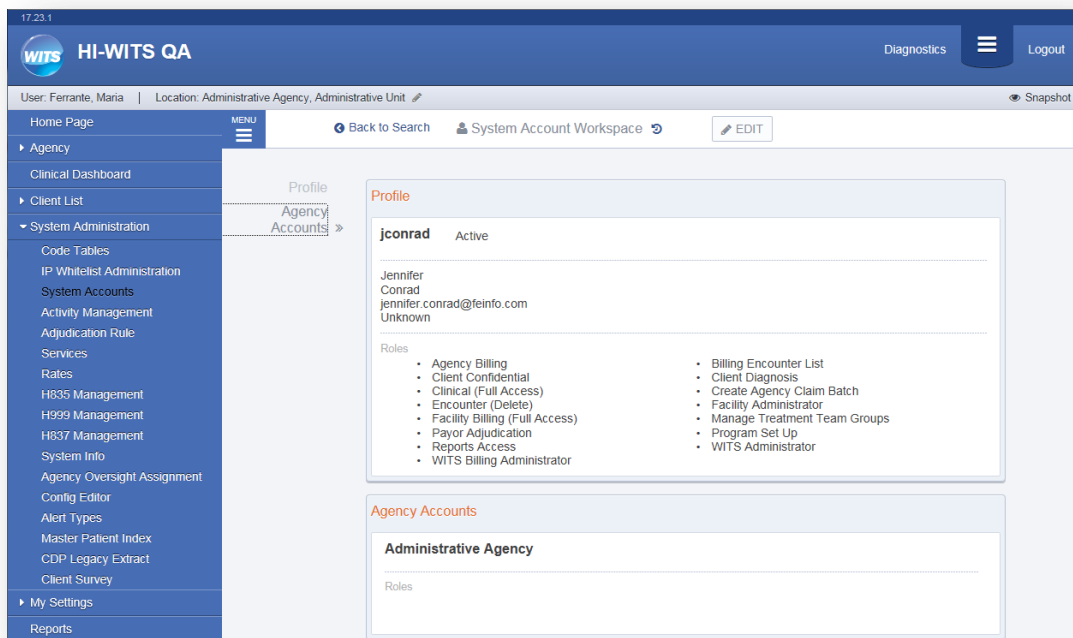
1. **Collapsible menu**- allows more horizontal screen real estate.
2. **Panels**- are seen only if they have data, eliminating long lists and multiple screens.
 - a. Panels are designed for information presentation rather than data entry.
3. **Completion Requirements** - define the requirements for an item to be complete.
 - a. Profile completion is tracked. You add the Staff Member information and save immediately.
 - b. Completion Requirements shows you what is missing.
4. **Domain event history**
 - a. Tracks all operations / changes in reverse chronological order. Currently only key fields are displayed so you understand the key operations performed.
 - b. Enables the user to see more audit records.
5. **Dropdowns now have paging** – helping to manage many values in a long dropdown.
6. **Ease of printing**- displays the panels without all the extra spacing and formatting.

Accounts

WITS EA introduces two types of accounts, a System Account and an Agency Account.

A System Account is the overarching account which allows users such as WITS Administrators to have the same roles in all Agencies in WITS. Any user's login information also lives here as the System Account represents the user's login to the system. In contrast, the Agency Account is where the System User's Staff Member record is created, and where the user's roles or permissions in that agency are created and live.

In the screenshot below, you can see the System Account for user "jconrad". This user has cross-agency roles such as "WITS Administrator". You can also see that this user has a Staff Member record in the Administrative Agency. Note that the user has no assigned roles within the Administrative Agency. This user's roles will carry over to every agency from the System Account role assignments.



Agency Accounts versus System Accounts

- a. **Old Structure:**
 - i. Every user had an account under an agency. Some users had cross-agency roles assigned within that agency.
- b. **New Structure:**
 - i. A System Account represents a user's login to the system.
 - ii. An Agency Account lives under a system account, and represents a user's access to a particular agency.
 - iii. Everyone who has access to WITS (a login) has both a System Account and an Agency Account.
 - iv. When a user logs into WITS they receive both the system account roles and the agency account roles.
 - v. In place of the old "Staff List" you will see the "Staff Members" menu. This area allows for searching, additions and updates of a user's account within the context agency.
 - vi. Staff who are set up in WITS but do not have a login are found simply under the Agency - > Staff Members menu item, in their context agency. These individuals do not have a System Account or an Agency Account.
 - vii. There is also a System Accounts menu item under System Administration. As a WITS administrator, you will be able to see All System Accounts and Agency Accounts across the system.
- c. **Agency – Staff Members:** Agency Accounts as well as Staff Member information is available at the Staff Member menu item.
 - i. You will primarily use the Staff Member screens (in the context of an agency) to set up any new user.
 - 1. As soon as you add the Account information, WITS will create both a System Account and an Agency Account.
 - 2. All Agency Account roles can be assigned here.
 - 3. If you need to give a new user cross-agency access roles (such as WITS Administrator, Agency Full Access, ATR Administrator, SBIRT Administrator, Agency Oversight, etc.), you will go to the System Administration – System Account menu item to do this.
 - ii. You will set up Staff Members who do not have access to WITS (who do not have an account) here.
- d. **System Administration – System Accounts:**
 - i. This area will primarily be used to find all of a user's Agency Accounts and compare to their system account, as well as to give roles to the System Account.
 - 1. Any user who has cross agency access roles, may in fact have a different set of permissions their Agency Account.
 - ii. This area is also used to set up cross-agency role access for specific staff who need that.

e. Migration of current users:

- i. Users who were authorized for any type of cross-agency access will find that those roles are visible and modifiable available through System Administration – System Account. Their Staff Account (at the agency level) will have no roles.
- ii. All other users (those who were not authorized for any type of cross-agency access) will find that they have a System Account and a Staff Member profile with the appropriate roles assigned to them, as they were assigned previously.

Staff Members

A staff member is a member of the staff of that agency. Staff members live at the Agency level.

Searching For a Staff Member

To begin:

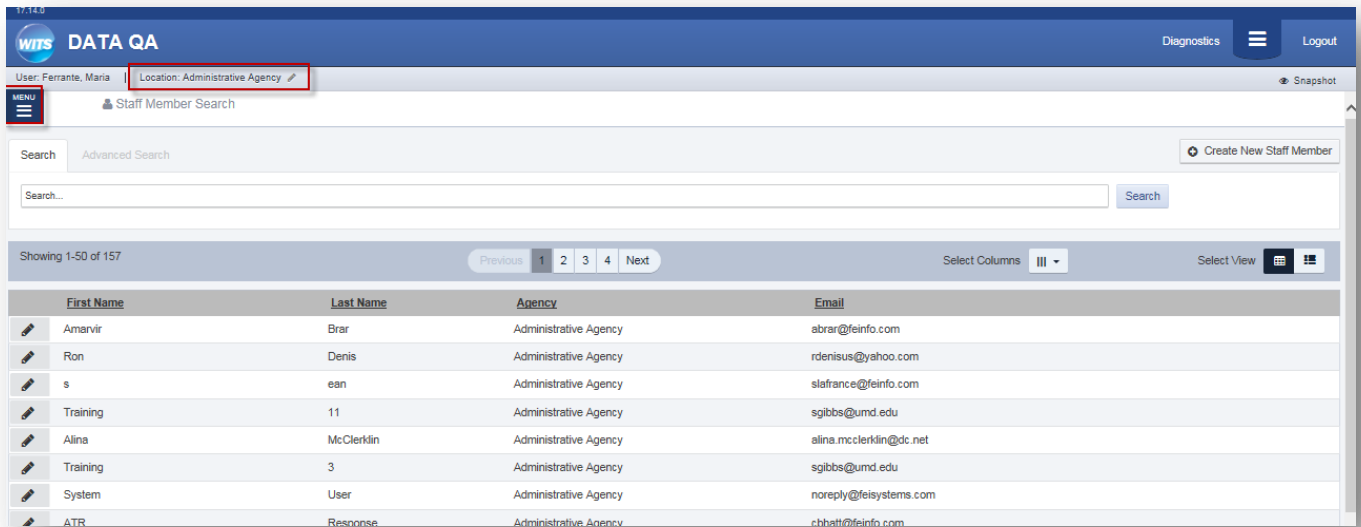
1. Ensure you are in the proper agency prior to searching for a staff record in that agency.
2. In the left menu, click **Agency**, then **Staff Members**.

Note: The Staff Member menu item was previously called Staff List.

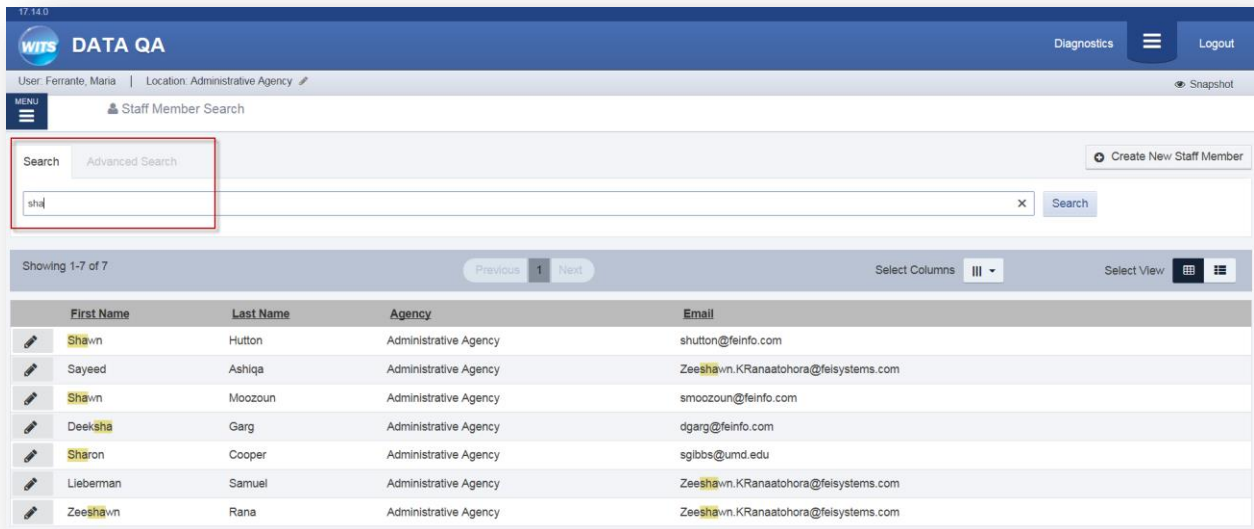
The screenshot displays the HI-WITS QA web application. The top navigation bar includes the WITS logo, the text "HI-WITS QA", a "Diagnostics" link, a hamburger menu icon, and a "Logout" link. Below the navigation bar, the user information "User: Ferrante, Maria" and the location "Location: Administrative Agency, Administrative Unit" are shown. The left sidebar contains a navigation menu with the following items: Home Page, Agency (highlighted with a red box), Agency List, Agency Profile, Aliases, Contacts, Governance, Relationships, Announcements, Referrals, Removed Consents, Wait List, Deleted Clients, GPRA Discharge Due, GPRA Follow-up Due, Facility List, Staff Members (highlighted with a red box), Tx Team Groups, Billing, and Contract Management. The main content area displays the "Agency List" table, which has columns for Actions, Name, Display Name, and Description. The table lists various agencies, including 1HTC Agency - C, 1HTC-Agency-Prov, Administrative Agency, Adult Mental Health Division, Alcohol and Drug Abuse Division, Alcoholic Rehabilitation Services of Hawaii, Inc, Aloha House, Inc, ATR 3 CM, ATR Contractor, ATR3 Provider, ATR3b, AutomatedTest-Provider, Automation Agency 1 - Case Management, and Automation Agency 2 - ATR Contractor.

Actions	Name	Display Name	Description
	1HTC Agency - C	1HTC Agency -C	Contractor
	1HTC-Agency-Prov	1HTC-Agency-Pro	Provider
	Administrative Agency	Admin Agency	WITS System Administration
	Adult Mental Health Division	AMHD	
	Alcohol and Drug Abuse Division	ADAD	SSA/Treatment Services Contractor
	Alcoholic Rehabilitation Services of Hawaii, Inc	ARSH	
	Aloha House, Inc	Aloha House	
	ATR 3 CM	ATR 3 CM	Case Manager (non-military assessor agency)
	ATR Contractor	ATR Contractor	ATR RSS Contractor
	ATR3 Provider	ATR3 Provider	
	ATR3b	ATR3b	
	AutomatedTest-Provider	AutomatedTest	Automated Test Provider - This provider agency is for Automated Testing. Please refrain using this agency for regular testing.
	Automation Agency 1 - Case Management	Auto Agency 1	Automation Agency 1 - Case Management
	Automation Agency 2 - ATR Contractor	Auto Agency 2	Automation Agency 2 - ATR Contractor

- The new Staff Member screen will open.



- To search for an existing Staff Member, begin by typing the staff members name in the simple search. As you begin to type the staff members name, the list screen begins to filter and the corresponding characters in those records are highlighted in yellow.



- Or, search for an existing Staff Member by creating a custom search by using the advanced search.

The screenshot displays the 'HI-WITS QA' interface. At the top, the header shows the user 'Ferrante, Maria' and the location 'Administrative Agency, Administrative Unit'. The main section is titled 'Staff Member Search' and features a red box highlighting the 'Advanced Search' tab. Below this, there are sections for 'My Saved Searches' and 'Manage Saved Searches'. A search criteria builder is visible, with a dropdown menu showing options like 'Has IP Session', 'Agency', 'First Name', 'Is Locked', 'Last Name', 'Email', and 'Start Date'. There are also buttons for 'Add Search Criteria', 'Search', and 'Save Search'. At the bottom, the search results are displayed in a table with columns for 'First Name', 'Last Name', 'Agency', and 'Email'. The results show three entries: 'test', 'VasuC', and '17642'.

First Name	Last Name	Agency	Email
test	creat	Administrative Agency	ysun@feinfo.com
VasuC	NalluruC	Administrative Agency	vasu.nalluru@feisystems.com
17642	des	Administrative Agency	seath.kramoedh@feisystems.com

Note: When in an agency and searching for a staff member whether the user is either using a simple search or advanced search users can only search for a staff member in the agency that they are currently in. If they would like to search for a staff member across all agencies they can do so by clicking on System Administration followed by clicking on System Accounts and conduct their search.

Creating a Staff Member

1. Ensure you are in the proper agency prior to creating a staff record for that agency.
2. To create a new staff member click the **Create New Staff Member** link to open the **Staff Profile** screen.

17.21.1

WITS HI-WITS QA

Diagnostics Logout

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit

Snapshot

MENU

Staff Member Search

Search Advanced Search

Search... Search

Create New Staff Member

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Previous 1 2 3 4 5 Next

Select Columns Select View

First Name	Last Name	Agency	Email
test	creat	Administrative Agency	ysun@feinfo.com
VasuC	NalluruC	Administrative Agency	vasu.nalluru@feisystems.com
17613	doc	Administrative Agency	scott.kramperth@feisystems.com
Me	Voy	Administrative Agency	sean.lafrance@feisystems.com
Miles	Standish	Administrative Agency	michael.walker@alaska.gov

3. On the **Create New Staff Member** screen, enter the required information (indicated by a red bar to the right of the field) including:
 - a. **First Name**
 - b. **Last Name**
 - c. **Gender**
4. When complete click **Create**. You will then be taken to the Staff Member **Profile** screen.

Tip: The create button will remain un-active until all required fields have been completed.

Creating a Staff Member's Profile

The screenshot shows the HI-WITS QA interface. At the top, the header includes the WITS logo, 'HI-WITS QA', 'Diagnostics', a menu icon, and 'Logout'. Below the header, a status bar shows 'User: Ferrante, Maria' and 'Location: Administrative Agency, Administrative Unit'. A navigation bar contains 'MENU', 'Back to Search', 'Staff Member Workspace', and a 'DONE EDITING' button. The main content area is titled 'Profile' and features a profile card for 'Duckie, Rubber', a male staff member. The card includes a placeholder image of a rubber duck and a 'Date of Birth' field. To the right of the card is a 'Completion Requirements' section with three items: 'Add Email Address', 'Add Employment Start Date', and 'Add Staff Member Type'. Below this is an 'Additional items' list with various options like 'Define Employment Profile', 'Manage Accounts and Roles', 'Add Facility Assignment', 'Add Access Category', 'Add Professional Qualification', 'Add Email', 'Add Phone Number', 'Add Address', 'Add Identifier', 'Add Language', 'Add Checklist Item', 'Add Relationship', 'Add Training', 'Add Note', and 'Add Treatment Domain'. A tip box at the bottom left states: 'Tip: Now that you have created a staff member, on the profile panel enter in the staff member's date of birth and picture.'

17.21.1


WITS HI-WITS QA

Diagnostics Logout

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit

MENU Back to Search Staff Member Workspace DONE EDITING

Profile » Profile

 **Duckie, Rubber**
Male
Date of Birth:

Completion Requirements

- + Add Email Address ?
- + Add Employment Start Date ?
- + Add Staff Member Type ?

Additional items

- > Define Employment Profile
- > Manage Accounts and Roles
- > Add Facility Assignment
- > Add Access Category
- > Add Professional Qualification
- > Add Email
- > Add Phone Number
- > Add Address
- > Add Identifier
- > Add Language
- > Add Checklist Item
- > Add Relationship
- > Add Training
- > Add Note
- > Add Treatment Domain

Tip: Now that you have created a staff member, on the profile panel enter in the staff member's date of birth and picture.

1. Use the **Completion Requirements**, to complete the Staff Member's profile with the required information including:
 - a. **Add Email Address**
 - i. To begin, click on **Add Email Address** under the **Completion Requirements** section.
 - ii. Enter the email address.
 - iii. Click **Save**.
 - iv. After adding an email address you can also add:
 1. Add a phone number for the staff member.
 2. Add an address.
 3. Select the preferred method of contact.

The image shows a 'Contact Information' form. At the top, the title 'Contact Information' is highlighted with a red box. Below the title is a section labeled 'Preferred Method Of Contact:'. This section contains a dark grey panel with an email icon on the left. Inside the panel, there is a label 'Email Address:' followed by a text input field containing 'rubber.duckie@hi.org'. Below the input field is a checkbox labeled 'Primary'. At the bottom of the panel are 'Save' and 'Cancel' buttons. Below the dark grey panel, there are two sections: one with a phone icon and the text 'No Items' with an 'Add' button, and another with a location pin icon and the text 'No Items' with an 'Add' button.

If additional Contact Information needs to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When adding email addresses make sure to designate one as primary by checking the primary box as this will determine the email account where the staff member will receive their WITS login information.

b. **Add Employment Start Date & Add Staff Member Type**

- i. To begin, click on **Add Employment Start Date** under the **Completion Requirements** section. The **Employment Profile** screen shown below opens.
- ii. Enter the **Employment Start Date**.
- iii. Note: The **Staff Member Type** which is the next item on the completion module is also on this screen.
- iv. Select the **Staff Member Type**.
- v. Complete any additional fields as necessary.

The screenshot shows the 'Employment Profile' form. It contains several dropdown menus and date pickers. Red arrows point to the 'Staff Member Type' dropdown and the 'Employment Date Range' date picker. The 'Employment Date Range' section also includes a 'Has end date' checkbox.

Employment Profile

Job Title: Select

Staff Member Type: Select

Employment Type: Select

Employment Date Range: [Date Picker] - [Date Picker] ☒ Has end date

Full Time Equivalent: Select

Taxonomy Type: Select

Taxonomy Classification: Select

vi. Click **Save**.

i. *The panel now appears as below.*

c.

The screenshot shows the 'Employment Profile' form after saving. The 'Staff Member Type' is now 'Administrator' and the 'Employment Date Range' is '08/17/2014'. The 'Add' button is visible at the bottom.

Employment Profile

Job Title: Full Time Equivalent: Taxonomy Type: Taxonomy Classification: Taxonomy Specialization: Relationships: Add

Staff Member Type: Administrator

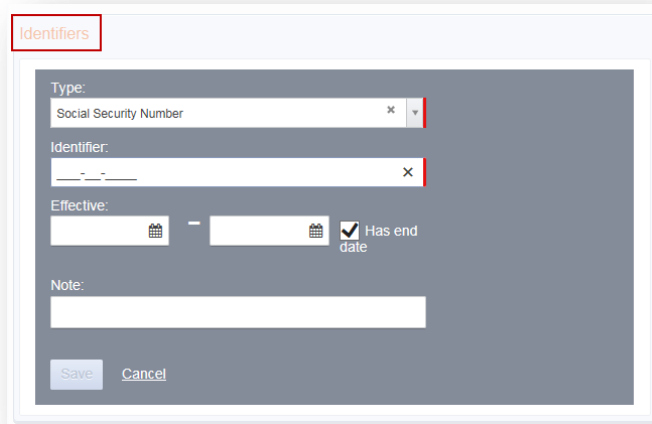
Employment Type: Employment Date Range: 08/17/2014 -

o

c

ial Security Number (This field may or may not show up in the completion module

depending on whether or not you have this as a required field in WITS Prime, however, it does show up in the **Additional items** list under **Identifiers** for everyone to use).




1. To begin, click on **Add Social Security Number** under the **Completion Requirements** section and the **Identifiers** screen above appears.
2. Choose **Social Security Number** as the **Type of Identifier**
3. **Enter** the social security number
4. Click **Save**
5. If additional **Identifiers** such as DEA numbers, Employee Numbers, Social work number etc. need to be added click **Add** under the corresponding section of the panel and repeat the above steps.




Tip: As you complete menu items whether in the **Completion Requirements** section or in the **Additional items** sections the items move from the right hand side of your screen under the Completion Module to the left hand side under **Profile**. By clicking on the items under profile this can be used as a navigation menu to view completed items in the staff member's profile. As the user clicks on the various panels they are automatically brought to that panel.

If the **Completion Requirements** sections ONLY are completed the Staff Members profile will appear as below:



Profile














Duckie, Rubber
Male
Date of Birth:
08/26/1982




Employment Profile

Job Title:	Staff Member Type: Administrator	Employment Type:	Employment Date Range: 08/17/2014 -	
Full Time Equivalent: Taxonomy Type: Taxonomy Classification: Taxonomy Specialization:				
Relationships:				
 Add				

Contact Information

Preferred Method Of Contact: Phone				
	rubber.duckie@hi.org	Primary		
 Add				
	Mobile	478-698-5698	Primary	
 Add				
	Home 1515 Quack Quack Lane Honolulu Hawaii 21356 Confidential: Years of stay:			
 Add				

Identifiers

Social Security Number	999-99-9999	-		
Note:				
 Add				

Creating Staff Member Accounts

After you have completed all the items in the **Completion Requirements** section, the next step is to set up the staff member with an account in WITS. The following additional items must be completed:

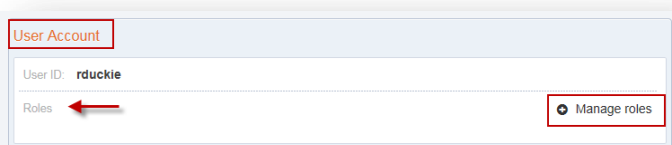
1. **Manage Accounts and Roles:** *This allows you to create a login for your staff member and grant them access to perform various actions.*
 - a. To begin, under the **Additional Items** section click **Manage Accounts and Roles**.
 - b. This will open the **User Account** panel below.



The image shows a 'User Account' panel. At the top, the title 'User Account' is highlighted with a red box. Below the title is a form with a 'User ID:' label and a text input field containing 'rduckie'. The input field has a red border. Below the input field are two buttons: 'Create Account' and 'Cancel'.

Tip: Once you enter a user ID you cannot edit this field.

- c. Enter the **User ID** that you would like the staff member to use to log into WITS.
- d. Next, click **Create Account**.
- e. When you click **Create Account** the username is automatically emailed to the staff member. In a separate email the staff member also receives a link which allows them to set their password, pin and security question.
- f. Once you have created the staff member's account, the **User Account** panel now displays a Role section.



The image shows the 'User Account' panel after account creation. The 'User ID:' field now displays 'rduckie'. Below it is a 'Roles' section, which is highlighted with a red box and a red arrow pointing to it. To the right of the 'Roles' section is a button labeled 'Manage roles' with a plus icon, also highlighted with a red box.

- g. To assign roles to the staff member click **Manage roles**.

Tip: The roles that you are granting the Staff Member here are at the Agency Account level.

Roles

Duckie, Rubber

Available Roles

☒ Show description

Search...

Admission (Full Access)

Full access to all options under Client List/Activity List/Admission.

Task Group

[View included roles](#)

+

Admission (Read-Only)

Read-Only access to all options under Client List/Activity List/Admission.

Task Group

[View included roles](#)

+

Admission Delete

Allow the ability to delete Admission records under Client List/Activity List/Admission.

Task Group

[View included roles](#)

+

Agency Administrator

This role should be assigned to the person in charge of updating an Agency record (Agency Profile, Contacts, Governance, Announcements, Tx Team Groups, etc.). This role gives access to all sub-menus under the Agency List, as well as Group Notes and the Reports section.

Task Group

[View included roles](#)

+

Included Roles: (hide roles)

- A/P Administrator (Read-Only)
- Agency Administrator
- Agency Reporting
- Assessments Delete
- Can Grant/Revoke Agency Billing
- Can Grant/Revoke Agency Invoicing Full
- Can Grant/Revoke Agency Invoicing View
- Can Grant/Revoke Client Voucher Signoff
- Can Grant/Revoke Cross Agency Waitlist Management
- Can Grant/Revoke Privacy Officer
- Can Grant/Revoke Program Set Up
- Can Grant/Revoke Support Ticket Agency User
- Can Grant/Revoke Universal Referral
- Manage Treatment Team Groups

Agency Billing

Full access to the Agency Billing screens under Agency/Billing.

Task Group

[View included roles](#)

+

Agency Events (Full Access)

This role will give the user the ability to enter not client specific Events at the Agency level.

Task Group

[View included roles](#)

+

Assigned Roles

☒ Show description

Search...

Activate/Deactivate System Accounts

Can activate/deactivate System Accounts.

Task

Included Roles: (hide roles)

- Activate/Deactivate System Accounts

Agency H999 Management

Allows access to the Agency H999 Management screen.

Task Group

[View included roles](#)

+

Agency Invoicing (Full Access)

Full access to the Invoicing screens used for Cost Reimbursement and located under Agency Billing.

Task Group

[View included roles](#)

+

Assessments (Read-Only)

Read-Only access to all options under Client List/Activity List/Assessments.

Task Group

[View included roles](#)

+

Included Roles: (hide roles)

- Assessments (Read-Only)
- Clinical

Can Grant/Revoke NOMS Administrator

Can Grant/Revoke NOMS Administrator

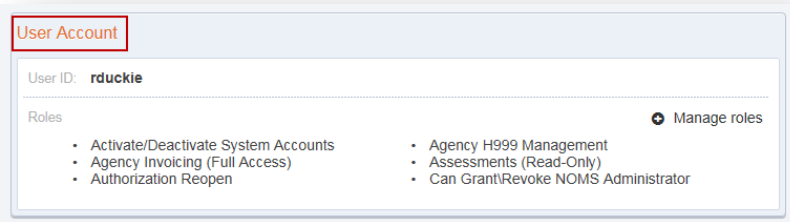
Task

[View included roles](#)

+

- h. The **Roles** screen below appears.
- i. Users can:
 - i. Search for available roles by typing in the available roles search box which will filter the results as the user types
 - ii. View included roles in each role
 - iii. View the role description
- j. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.
- k. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.

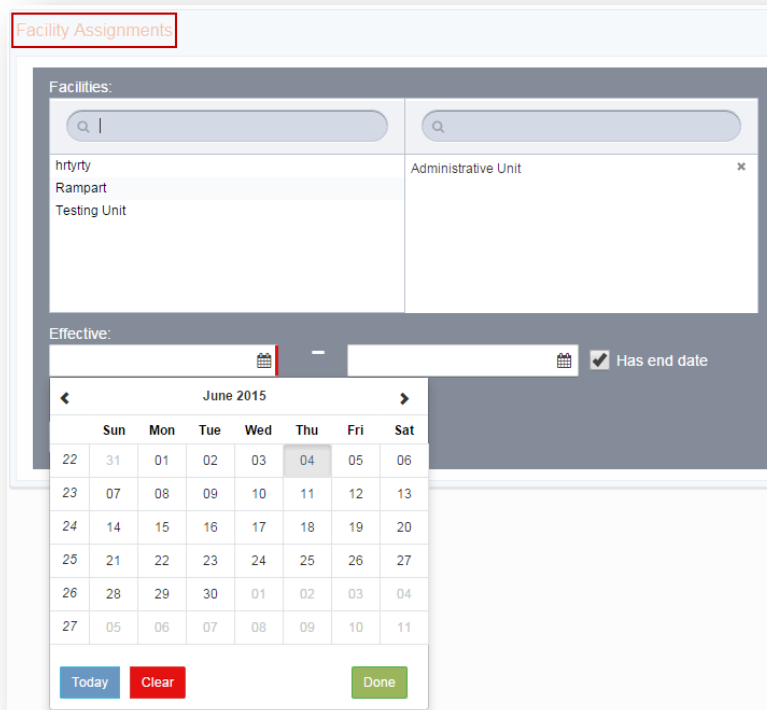
- I. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown in the **User Account** panel.



The screenshot shows the 'User Account' panel for user ID 'rduckie'. It lists assigned roles: 'Activate/Deactivate System Accounts', 'Agency Invoicing (Full Access)', 'Authorization Reopen', 'Agency H999 Management', 'Assessments (Read-Only)', and 'Can Grant/Revoke NOMS Administrator'. A 'Manage roles' link is visible.

Roles	
• Activate/Deactivate System Accounts	• Agency H999 Management
• Agency Invoicing (Full Access)	• Assessments (Read-Only)
• Authorization Reopen	• Can Grant/Revoke NOMS Administrator

2. **Facility Assignment:** *Allows you to assign the Staff Member access to a facility.*
- To begin, under the **Additional Items** section click **Add Facility Assignment**.
 - The **Facility Assignments** screen appears.



The screenshot shows the 'Facility Assignments' screen. It includes a search bar for facilities, a list of facilities (hrtyty, Rampart, Testing Unit), and a date selection interface. The date selection interface shows a calendar for June 2015 with the 4th selected. There is a 'Has end date' checkbox and buttons for 'Today', 'Clear', and 'Done'.

Facilities:

hrtyty
Rampart
Testing Unit

Administrative Unit

Effective: ☒ Has end date

June 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
22	31	01	02	03	04	05
23	07	08	09	10	11	12
24	14	15	16	17	18	19
25	21	22	23	24	25	26
26	28	29	30	01	02	03
27	05	06	07	08	09	10

Today Clear Done

Tip: Select one facility at a time and enter the effective start and end dates if applicable. This will allow you to grant user access to that facility for a specified period of time.

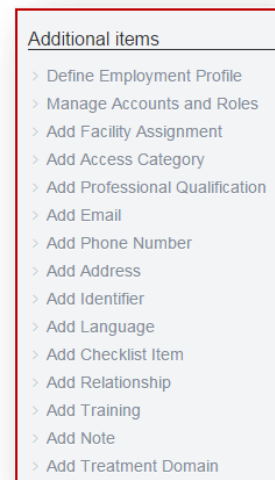
- Select the **Facility** that you would like the staff member to have access to.
- Select the **Effective** or beginning date of access. If applicable, select the end date you would like the access to end, otherwise, uncheck the **Has end date** box.
- Click **Save**.

Adding additional items to a profile

The remaining items under the **Additional items** section allow the user to customize the staff member's profile with relevant data. It is important to note that some of the panels such as access category, and the treatment domain panel below are exposed and used in some WITS instances, exposed but not used in others and NOT shown in some instances. Please only complete panels which you normally complete in WITS Prime or find useful.

Professional Qualifications: This panel allows us to denote a degree, certification, or license held by the staff member. In addition you can record the issuing institution and the effective dates.

- a. To begin, under the **Additional Items** section click **Add Professional Qualifications**.
- b. The **Professional Qualifications** panel appears below.



Tip: After completing the **Professional Qualifications** panel if you click **Include in Display Name**, the **Profile** panel now shows the user's credentials next to their name.

A screenshot of a 'Professional Qualifications' form. The form has a title bar 'Professional Qualifications'. It contains several fields: 'Category:' with a dropdown menu showing 'License'; 'Type:' with a dropdown menu showing 'Licensed Clinical Psychologist'; 'Issuer Name:' with a text field containing 'John's Hopkins University'; a checkbox labeled 'Include in Display Name' which is checked; 'Effective:' with two date pickers and a 'Has end date' checkbox which is checked. At the bottom are 'Save' and 'Cancel' buttons.

- c. Select the **Category** the degree falls into:
 - i. Certification
 - ii. Degree
 - iii. License
- d. Select the **Type**: Filters based on the category chosen.
- e. Complete the **Issuer's Name** field.
- f. Enter the **Effective Dates** if applicable.
- g. Click **Save**.

Language: Being able to communicate in more than one language can be essential in the treatment process if a client does not speak English. The Languages panel allows you to document the various languages that a staff member speaks and the proficiency by using a Likert Scale. The Likert Scale allows you to quickly view the expertise of a staff member's reading, speaking and writing by looking at the multi-colored scales.

- a. To begin, under the **Additional items section** click the **Add Language**.
- b. The Languages panel appears.

- c. Select the language that the staff member speaks.
- d. Next, hover over the various scales. Each rectangle indicates the corresponding proficiency level. Choose the appropriate level for each of the scales.
- e. Click **Save**.
6. To add additional languages click **Add** under the corresponding section of the panel and repeat the above steps.

Checklist Item: The Checklist panel allows you to create a checklist of items which have been completed or are in the process of being completed for the staff member such as a background check and performance review.

Note: In WITS Prime Check List items were displayed on the Staff Profile screen. Some instances had it turned on and other had it turned off. These seven items below have either become Check List items or a Check List Item Follow Up Question.

- ✓ Dev. Plan Date
- ✓ Last TB Test Date
- ✓ Performance Review Date
- ✓ Policies and Procedures Manual Received
- ✓ Required Background Checks Completed
- ✓ Background Check Outcomes Acceptable
- ✓ Last Performance Appraisal Process Participation

- a. To begin creating a Check list, under the **Additional Items section** click the **Add Checklist Item**.
- b. The **Checklist** panel appears.

- c. Select the correct category:
 - i. On Boarding
 - ii. Periodic
 - iii. Separation
- b. Select the corresponding **Type**.

A screenshot of a web form titled "Check List Items". It contains two dropdown menus. The first is labeled "Category:" and has "On Boarding" selected. The second is labeled "Type:" and has "Background Check" selected. At the bottom left are "Save" and "Cancel" buttons.

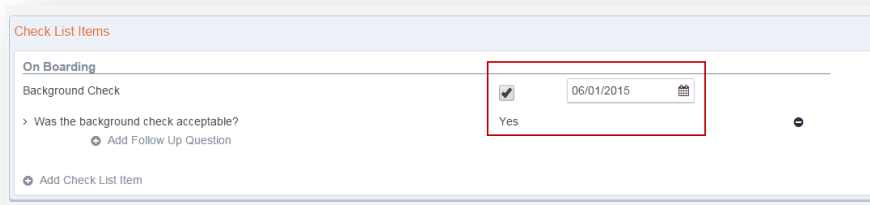
- d. Then click save. The screen will appear as below.

A screenshot of the "Check List Items" form after saving. The "On Boarding" category is selected. Under "Background Check", there is a checkbox and a button labeled "Add Follow Up Question" which is highlighted with a red box. At the bottom is a button labeled "Add Check List Item".

- e. Next, click **Add a Follow Up Question**.
- f. Select the corresponding question and answer and click **Save**.

A screenshot of the "Check List Items" form with a follow-up question added. The "On Boarding" category is selected. Under "Background Check", there is a checkbox and a button labeled "Add Follow Up Question". Below this, a new question "Was the background check acceptable?" is added, with "Yes" selected as the answer. The question and answer dropdowns are highlighted with a red box. At the bottom are "Save" and "Cancel" buttons.

- g. Check the check box to show the checklist item has been completed and enter the completed date.

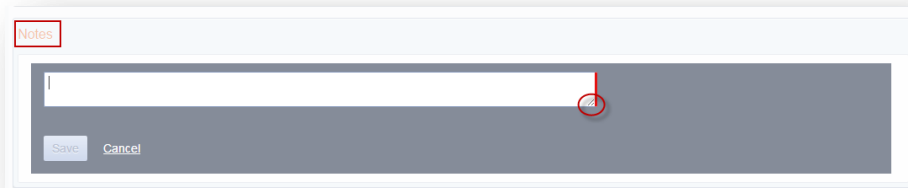


The screenshot shows a 'Check List Items' panel. Under the 'On Boarding' section, there is a 'Background Check' item. To its right is a checked checkbox and a date field containing '06/01/2015'. Below this, there is a question 'Was the background check acceptable?' with a 'Yes' response. At the bottom, there is an 'Add Check List Item' button.

- h. To add additional checklist items click **Add** under the corresponding section of the panel and repeat the above steps.

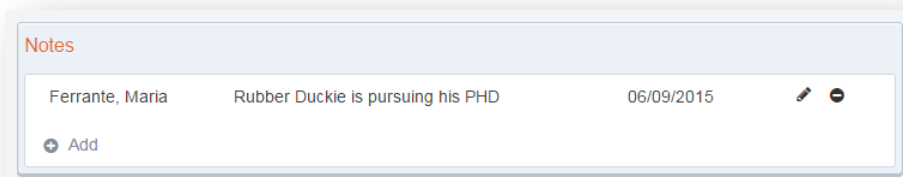
Notes: The Notes panel allows you to document anything you feel necessary in regards to this staff member. As you type the box automatically expands which allows the user to easily view what is being typed. In addition, the user also has the ability to enlarge the text box by pulling the tab in the lower right hand corner of the box.

- a. To begin, under the **Additional items section** click the **Add Note**.
- b. The **Notes** panel below appears.



The screenshot shows a 'Notes' panel. It features a large text input field with a red circle highlighting a tab in the bottom right corner. Below the input field are 'Save' and 'Cancel' buttons.

- c. Enter your note.
- d. Click **Save**.



The screenshot shows the 'Notes' panel after a note has been saved. It displays a list of notes. The first note is for 'Ferrante, Maria' with the text 'Rubber Duckie is pursuing his PHD' and a date stamp of '06/09/2015'. There are edit and delete icons to the right of the note. At the bottom, there is an 'Add' button.

- e. To add additional **Notes** click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When your note is saved WITS automatically enters a date stamp on the panel.

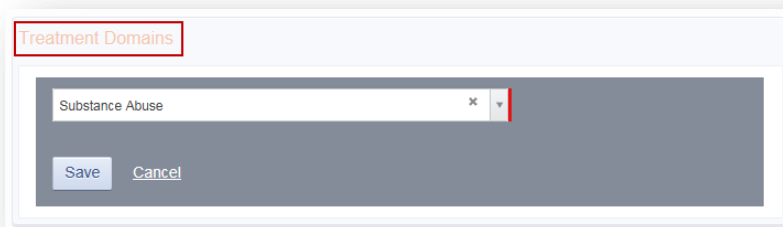
Training: The training panel allows you to enter any trainings that the staff member has completed and the date of completion.

- a. To begin, under the **Additional Items section** click the **Add Training**.
- b. The **Training** panel below appears.
- c. Enter the training course that the staff member completed.
- d. Enter the date the course was completed.
- e. Click **Save**.
- f. To add additional **Trainings** click **Add** under the corresponding section of the panel and repeat the above steps.

A screenshot of a web application panel titled "Training" in a red-bordered box. The panel has a dark gray background. It contains two text input fields: "Training Course:" with the value "Preventing Harassment" and "Completed:" with the value "06/17/2015". A calendar icon is visible next to the date field. At the bottom, there are two buttons: "Save" and "Cancel".

Treatment Domains: If enabled in your instance complete the Treatment Domains panel.

- a. To begin, under the **Additional items section** click the **Add Treatment Domain**.
- b. The **Treatment Domain** panel opens.

A screenshot of a web application panel titled "Treatment Domains" in a red-bordered box. The panel has a dark gray background. It contains a text input field with the value "Substance Abuse" and a dropdown arrow icon. At the bottom, there are two buttons: "Save" and "Cancel".

- c. Select the correct domain.
- d. Click **Save**.
- e. If additional **Treatment Domains** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Access Category: If enabled in your instance complete the **Access Category** panel.

- a. To begin, under the **Additional Items** section click the **Add Access Categories**.
- b. The **Access Category** pannel below appears.

A screenshot of a software interface panel titled "Access Categories" in a light blue header bar. The main area of the panel is dark grey and contains a white dropdown menu with the text "Select" and a downward arrow. Below the dropdown are two buttons: a light blue "Save" button and a light grey "Cancel" button.

- c. Select the correct **Access Category**.
- d. Click **Save**.
- e. If additional **Access Categories** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Completed Staff Member Profile

If all fields both required and optional are completed your Staff Member Profile will appear as below.

17:21:1

HI-WITS QA

Diagnostics

Logout

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit

Back to Search

Staff Member Workspace

DONE EDITING

Profile

Employment Profile
User Account
Facility Assignments
Professional Qualifications
Contact Information
Identifiers
Check List Items
Languages
Training
Notes
Treatment Domains

Profile

Duckie, Rubber, LCP
Male
Date of Birth: 06/25/1962

Employment Profile

Job Title	Staff Member Type: Administrator	Employment Type:	Employment Date Range: 08/17/2014 -
Full Time Equivalent: Taxonomy Type: Taxonomy Classification: Taxonomy Specialization:			
Relationships:			
Relationship to this Staff Member:	Related Staff Member:		
Manager	Davidson, Harley		
Add			

User Account

User ID: **rudckie**

Roles

- Admission (Full Access)
- Assessments (Full Access)
- Edit Staff Members

- Agency Administrator
- Can Grant/Revoke Cross Agency Waitlist Management

Facility Assignments

Administrative Unit	06/01/2015
Program Assignments:	

Professional Qualifications

License	Licensed Clinical Psychologist	John's Hopkin's University
Degree	Bachelor of Science	NYU
Degree	Master's Degree	Loyola

Contact Information

Preferred Method Of Contact: **Phone**

rubber.duckie@hi.org
Primary

Mobile
478-698-5698
Primary

Home
1515 Quack Quack Lane
Honolulu, Hawaii 21356
Confidential
Years of stay:

Identifiers

Social Security Number	999-99-9999
Note:	
Medicaid Identifier	5866587441
Note:	

Check List Items

On Boarding

Background Check
☒
05/31/2015

> Was the background check acceptable?
Yes

Periodic

Performance Review
☒
06/24/2015

> Did the staff member participate in the performance review?
Yes

Languages

Italian	Reading: Very Proficient	Speaking: Extremely Proficient	Writing: Very Proficient
Spanish, Castilian	Reading: Moderately Proficient	Speaking: Moderately Proficient	Writing: Slightly Proficient

Training

Preventing Harassment	06/17/2015
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Notes

Ferrante, Maria	Rubber Duckie is pursuing his PhD	06/09/2015
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Treatment Domains

Substance Abuse

Additional Items

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Access Category
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address
- Add Identifier
- Add Language
- Add Checklist Item
- Add Relationship
- Add Training
- Add Note
- Add Treatment Domain

31 | Page

WITS Enhanced Architecture

System Accounts

Accessing a System Account

To access a Staff Member's System Account:

1. From the home page click **System Administration**
2. Then click **System Accounts**
3. You are now taken to the **System Account Search Screen**

17:23:11

WITS HI-WITS QA

User: Ferrante, Maria | Location: Administrative Agency, Administrative Unit

Diagnosics Logout

Home Page

Agency

Clinical Dashboard

Client List

System Administration

Code Tables

IP Whitelist Administration

System Accounts

Activity Management

Adjudication Rule

Services

Rates

H835 Management

H999 Management

H837 Management

System Info

Agency Oversight Assignment

Config Editor

Alert Types

Master Patient Index

CDP Legacy Extract

Client Survey

My Settings

Reports

Support Ticket

Search

Advanced Search

Search...

Showing 1-50 of 1049

Previous 1 2 3 4 5 6 7 8 9 10 Next

Select Columns

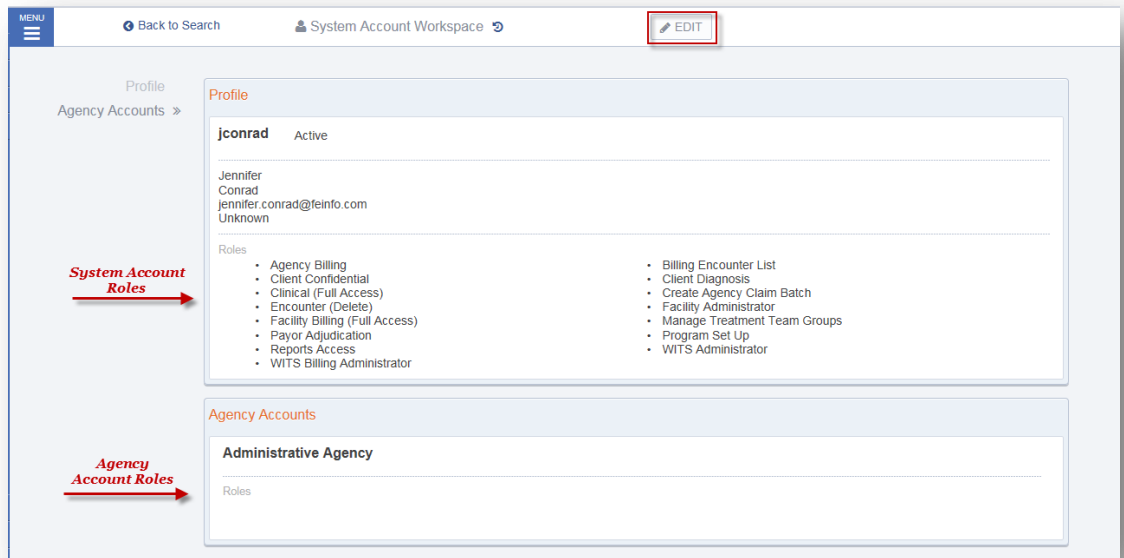
Select View

Identifier	Display Name	Status	Email	Phone Number
dvincent	Vincent, Donna	Active	hkocvincent@hawaii.rr.com	Unknown
ALima25	Lima, Andre	Deactivated	alima@poailani.org	Unknown
adurupan	Durupan, Alexander	Active	hkoadurupan@hawaii.rr.com	Unknown
darin.miura	Miura, Darin	Active	darin@bbcoahu.org	Unknown
sfasone	Fasone, Susan	Active	sfasone@poailani.org	Unknown
admin	User, Admin	Active	noreply@feisystems.com	Unknown
jconrad	Conrad, Jennifer	Deactivated	glucas@poailani.org	Unknown
		Active	hkobnunes@hawaii.rr.com	Unknown
jkaeo	Kaao, Jen	Active	jkaeo@hawaiiantel.net	Unknown
VFonoimoana63	Fonoimoana, Victor	Deactivated	vic@bbcoahu.org	Unknown
raini.miller	Miller, Raini	Active	raini@bbcoahu.org	Unknown

Deactivate Lock Reset Credentials View Profile

4. This screen allow the user to:
 - a. Search for a staff member across all agencies
 - b. Disable a Staff Member's Account
 - c. Lock a Staff Member's Account
 - d. Reset a Staff Member's Credentials
 - e. View a Staff Member's Profile
 - f. Download a list of all System Accounts in excel
 - g. View the Staff Member's Identifier which is the WITS username
5. After choosing the Staff Member, hover over the **Staff Member's Account** and click **View Profile**
6. This opens the **Staff Member's System Account** below.

Note: A System Account represents the Staff Member's login to the system. In the past a Staff Member's record had a login ID, now a Staff Member's System Account has an identifier which is the Staff Member's username. Previously in prime the Staff Member's login ID was on the account information page of the staff profile.



- a. The screen shot above shows WITS Administrator's System Account. Most WITS Administrators or System Administrators will not have any roles under their Agency Account. It is okay if they do, but is not necessary.
- b. Notice that this user's System Account above only has roles at the System Account level on the Profile panel. Those roles determine her access at a System Account level.
 - i. When this user enters any Agency, she maintains those System roles.
 - ii. If she also had roles assigned at the agency level, she would inherit those permissions while in the context of that agency.
- c. A Staff Member such as a counselor would only have roles in the Agency Accounts panel. These roles would be given to Staff Members when you are creating their Staff Member Profile. The Agency Account Roles can be managed through the Staff Member's Staff Profile in the Agency and in the System Administration panel above as they will automatically update each other.
- d. All users will still have a single System Account, single Agency Account and single Staff Member record.

7. To make any changes to the users **System Account** click **EDIT** at the top of the screen.
8. Administrative actions such as Manage Roles will appear at the right hand of the panels

The screenshot displays the 'Profile' and 'Agency Accounts' sections of the WITS Enhanced Architecture user management interface. The 'Profile' section for user 'jconrad' (Active) includes fields for name, email, and last name, along with a list of roles and administrative actions (Deactivate, Lock, Reset Credentials, and an edit icon). The 'Agency Accounts' section shows an 'Administrative Agency' with its own list of roles and administrative actions (Lock and Manage roles). Red boxes highlight the 'Deactivate', 'Lock', and 'Reset Credentials' buttons in the Profile section, the 'Manage roles' button in the Profile section, the 'Lock' button in the Agency Accounts section, and the 'Manage roles' button in the Agency Accounts section.

Profile

Agency Accounts »

jconrad Active

Deactivate Lock Reset Credentials

Jennifer Conrad
jennifer.conrad@feinfo.com
Unknown

Roles

- Agency Billing
- Client Confidential
- Clinical (Full Access)
- Encounter (Delete)
- Facility Billing (Full Access)
- Payor Adjudication
- Reports Access
- WITS Billing Administrator
- Billing Encounter List
- Client Diagnosis
- Create Agency Claim Batch
- Facility Administrator
- Manage Treatment Team Groups
- Program Set Up
- WITS Administrator

Manage roles

Agency Accounts

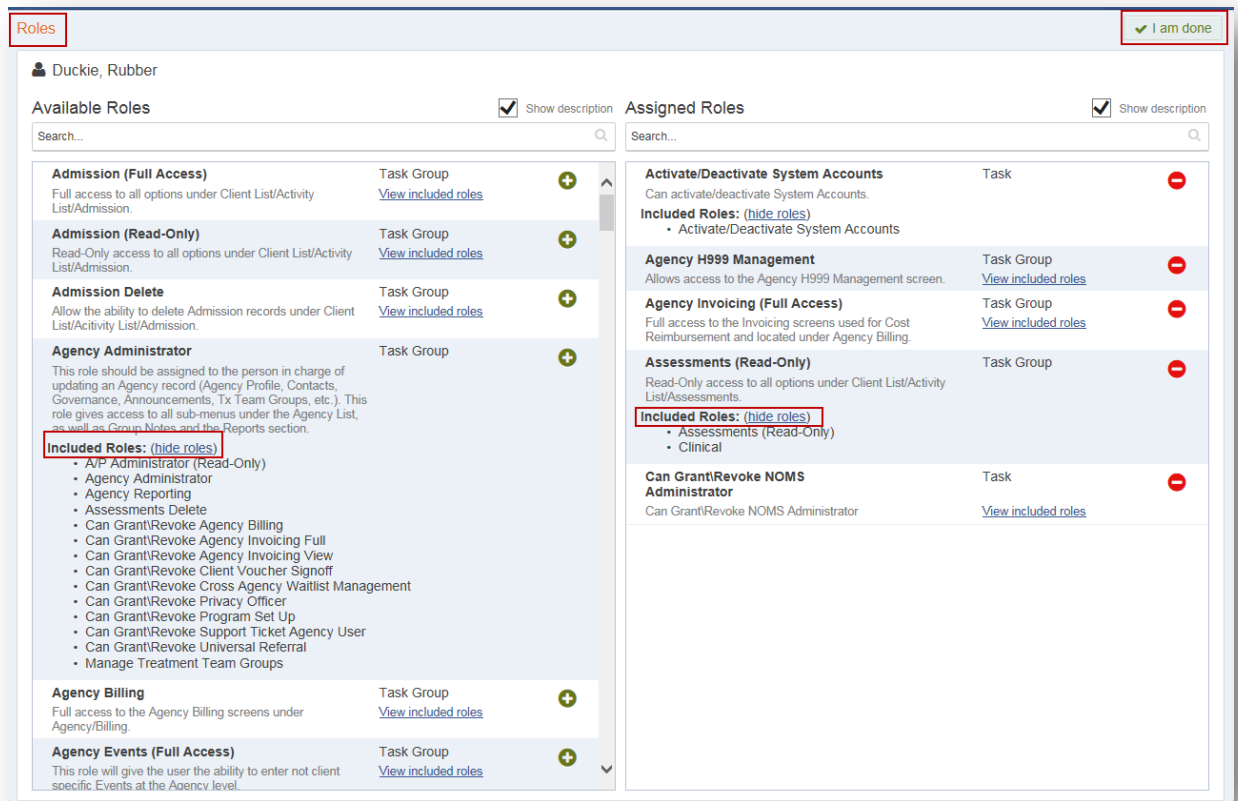
Administrative Agency

Lock

Roles

Manage roles

9. To add roles either to the **Staff Member's System Account** or to the **Agency Account** click on **Manage Roles** under the corresponding panel.



10. The **Roles** screen below appears.

- a. Users can:
 - i. Search for available roles by typing in the available roles search box which will filter the results as the user types
 - ii. View included roles in each role
 - iii. View the role description
- b. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.
- c. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.

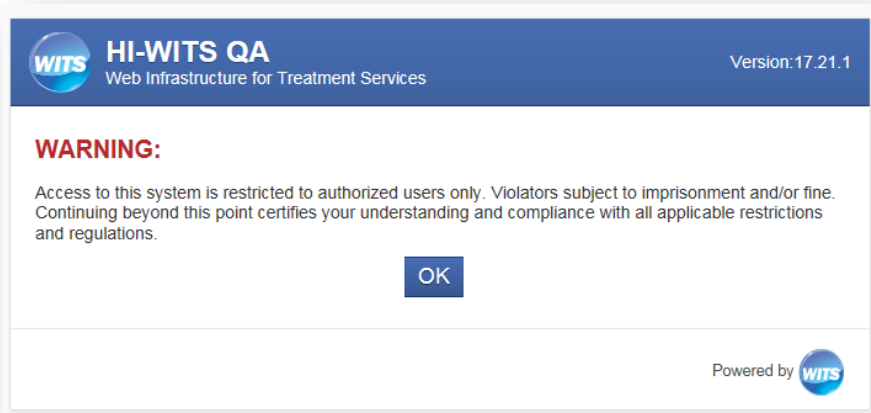
11. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown under the corresponding panel and the user is taken back to the Staff Member's System Accounts page.

Tip: To view the last time a Staff Member logged in, view their profile in the system account and click on the history button next to System Account Workspace. A list of all business operations performed on that system account are shown such as Activating and Deactivating an Account, End System Session, Grant System Role, Lock account, Revise Contact Information, Revised Session Expiration, Revoke System Role, Start System Session and Unlock.

Logging into WITS

The process of logging into WITS has changed as now the User ID, Password and Pin are all on the same page.

1. To login, open your browser then enter the **URL** of your **WITS** system.

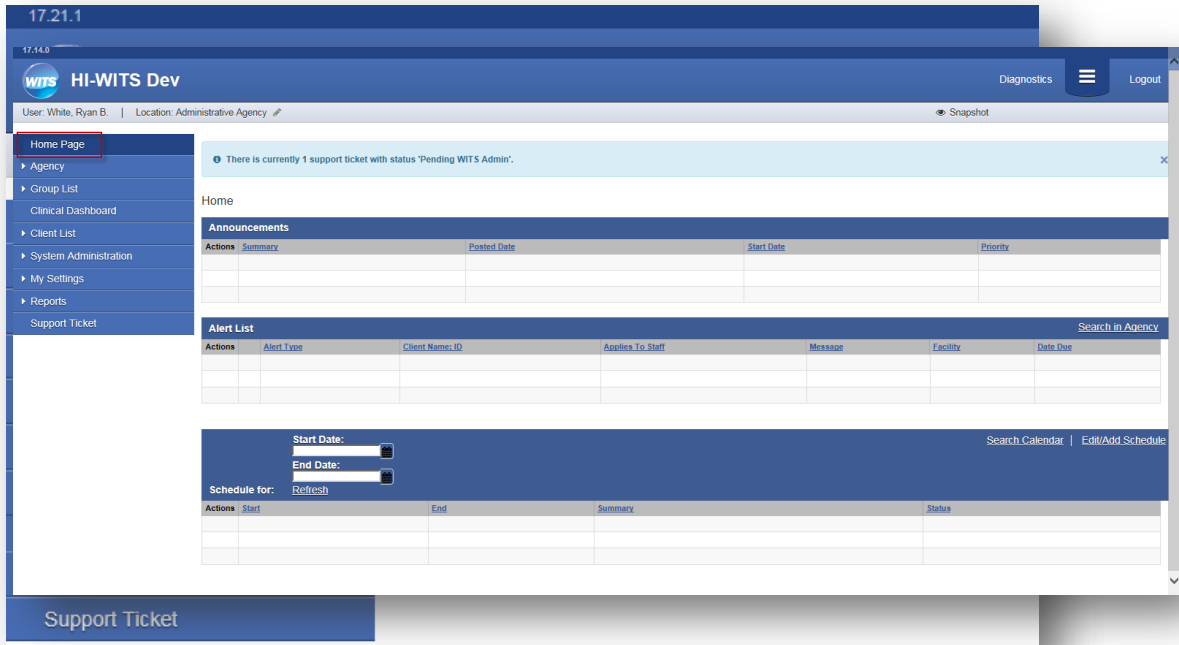


2. Type in your **User ID**, **Password** and **PIN** then click **Login**.

A screenshot of the Hawaii QA login page. The header is blue with the Hawaii state flag on the left, "Hawaii QA" in the center, and "Web Infrastructure for Treatment Services" below it. The page title is "Login". There are three input fields: "User ID", "Password", and "Pin". Below the "Pin" field is a blue "Login" button and a blue link "Forgot Password?". At the bottom right, it says "Powered by" followed by the WITS logo.

Tip: Any user who has not previously answered their security question will be prompted to answer it as soon as they log into 18.0 for the first time.

3. If asked, choose your Agency and Facility and click **Go**.

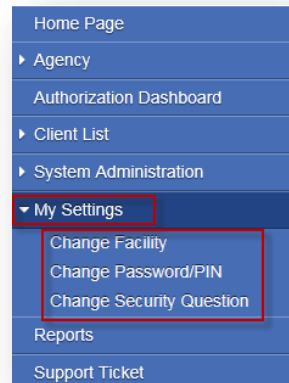


4. You will then be taken to your homepage.

System Settings

In order to allow more intuitive access in EA the **My Settings** menu item on the left hand navigation menu is being removed. The functionality will now be accessible in other places in the WITS system.

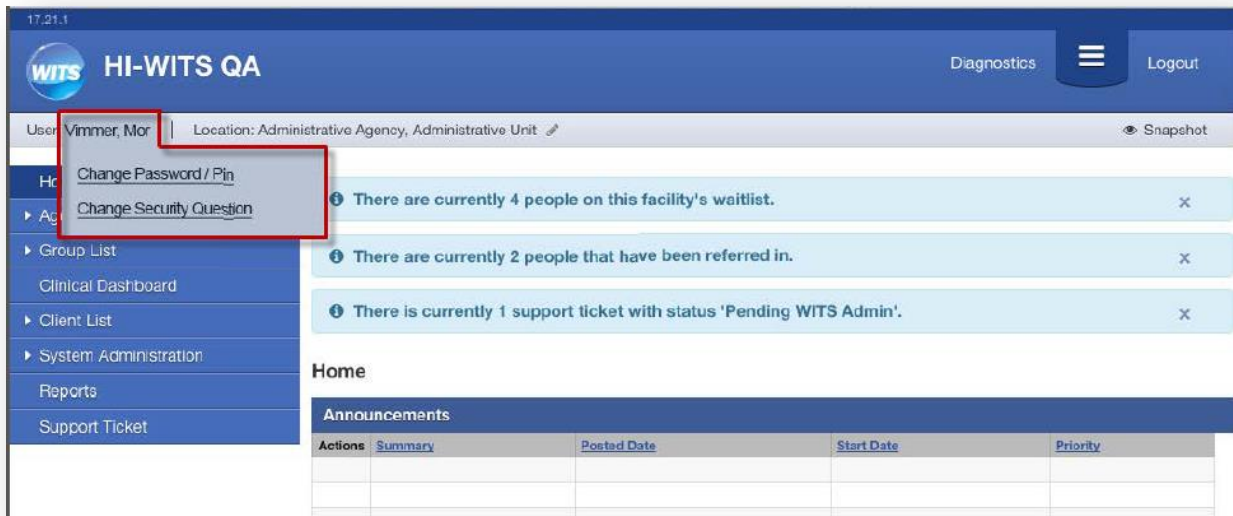
Currently the **My Settings** menu items allows the user to **Change Facilities**, to **Change Password/Pin**



and to Change Security Question.

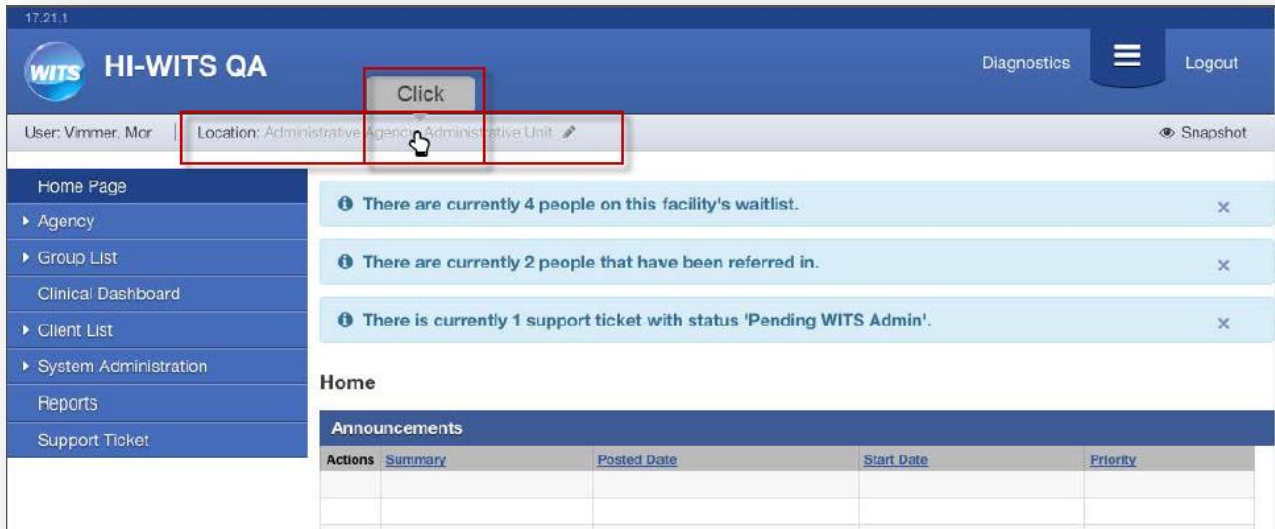
Password/Pin and Security Question

Users can now **Change Password/Pin** and **Change Security Question** by hovering over the user's Name which is displayed in the top left hand corner of the screen.

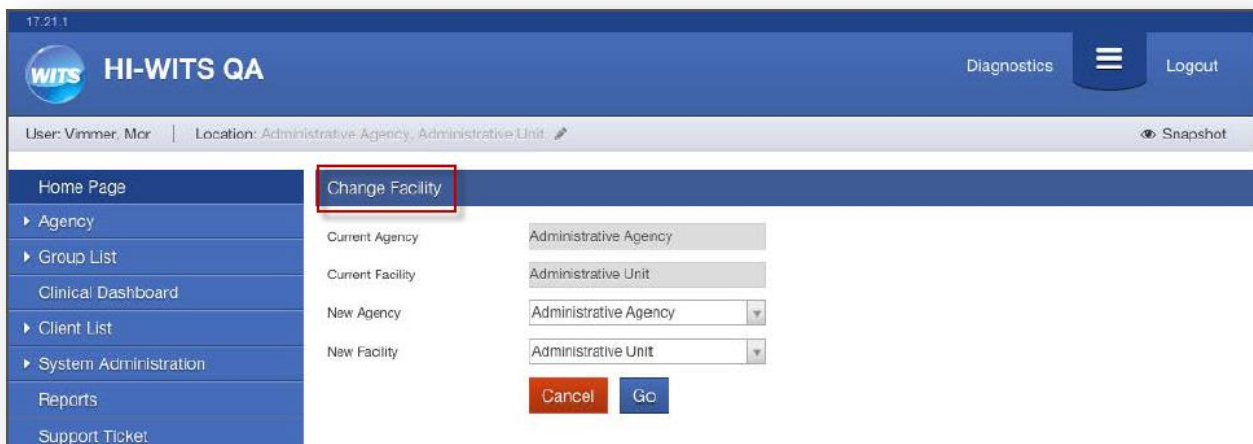


Changing Facilities

If users have access to more than once agency, facility or both they will be able to change facilities by clicking the **Location** in the top left hand corner of the screen.



Once the user clicks on **Location** they can now change their **Agency, Facility or both**.



Logging Out of WITS

The process of logging out of WITS has not changed.

1. To log out of WITS click the log out button in the top right hand corner of your screen.
2. The Logout screen will appear.
3. Click Yes to log out.

